Massachusetts Registration of Provider Organizations Program

Online Submission Platform User Manual

September 2017

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Introduction

The Health Policy Commission (HPC) and the Center for Health Information and Analysis (CHIA) have created an online submission platform for Provider Organizations to submit their Massachusetts Registration of Provider Organization (MA-RPO) materials. The platform streamlines reporting and makes the filing process more efficient by allowing Provider Organizations to access their previously submitted materials and make necessary updates to existing files.

This User Manual contains instructions on accessing the system, completing the required files for the 2017 filing, and submitting final materials to the MA-RPO program for review. Program staff are continually working to make enhancements to the online submission platform and will update this User Manual to reflect any updates. For additional details regarding the information Provider Organizations are required to submit, please review the Data Submission Manual (DSM) and Frequently Asked Questions available on the program website.

A. New in 2017

This User Manual contains new information on how to export your application to a Microsoft Excel file to facilitate printing (see page 19) and how to complete RPO-65 and RPO-65A of the Contracting Entity file in the online submission platform (see page 21)

If you have questions about how to use the online submission platform, please contact program staff for assistance at HPC-RPO@state.ma.us.

Accessing the Online Submission Platform

To access the online submission platform, you must complete an INET User Agreement form, available on the program website. Most users submitted this form during Initial Registration. If you have not completed an INET User Agreement form and want to access the online submission platform, please send a completed form to HPC-RPO@state.ma.us. If multiple individuals from a single Provider Organization wish to use the online submission platform, each individual should submit a separate INET User Agreement form.

You will receive an e-mail notification when your account has been activated. If you did not previously have an account with CHIA for reporting purposes, the e-mail notification will include the online submission platform URL, your user name, and a temporary password. If you already had an account with CHIA, the e-mail notification will include the online submission platform URL and your user name. You will use your existing password to log-in to the site.

To access the online submission platform, click on the URL in the e-mail notification or enter https://chiasubmissions.chia.state.ma.us/ in your browser.
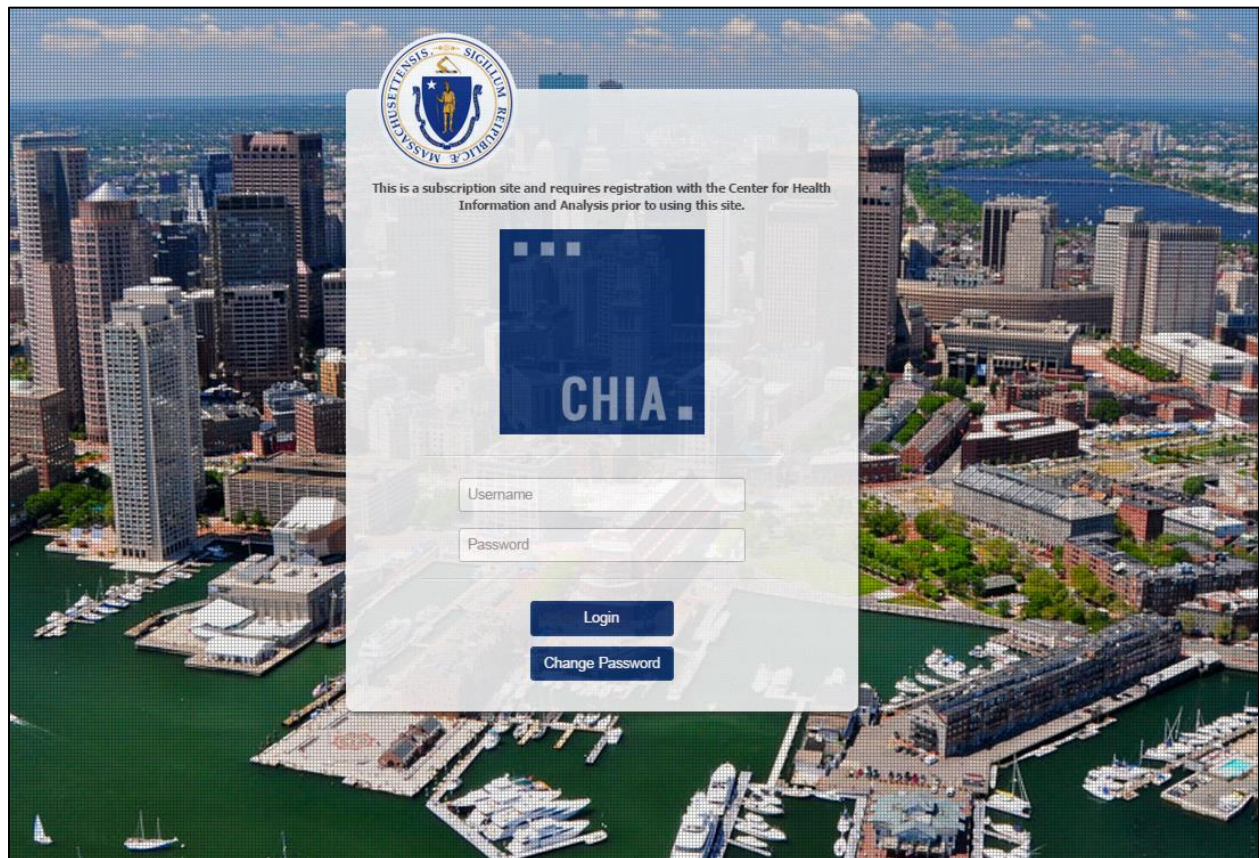
Enter your user name and password on the log-in page, shown above. For the security of your account, please change your temporary password once you have logged in to the system. If you forget your user name or password, please contact HPC-RPO@state.ma.us to have your password reset. You will not be able to request a password reset from within the system.

Once you have logged into the system, you will be prompted to select the application that you would like to access. Some individuals may only have access to the Registration of Provider Organizations application, while others who have other reporting obligations to CHIA may have access to other applications.

Select the Registration of Provider Organizations icon to access the Registration of Provider Organizations online submission platform.
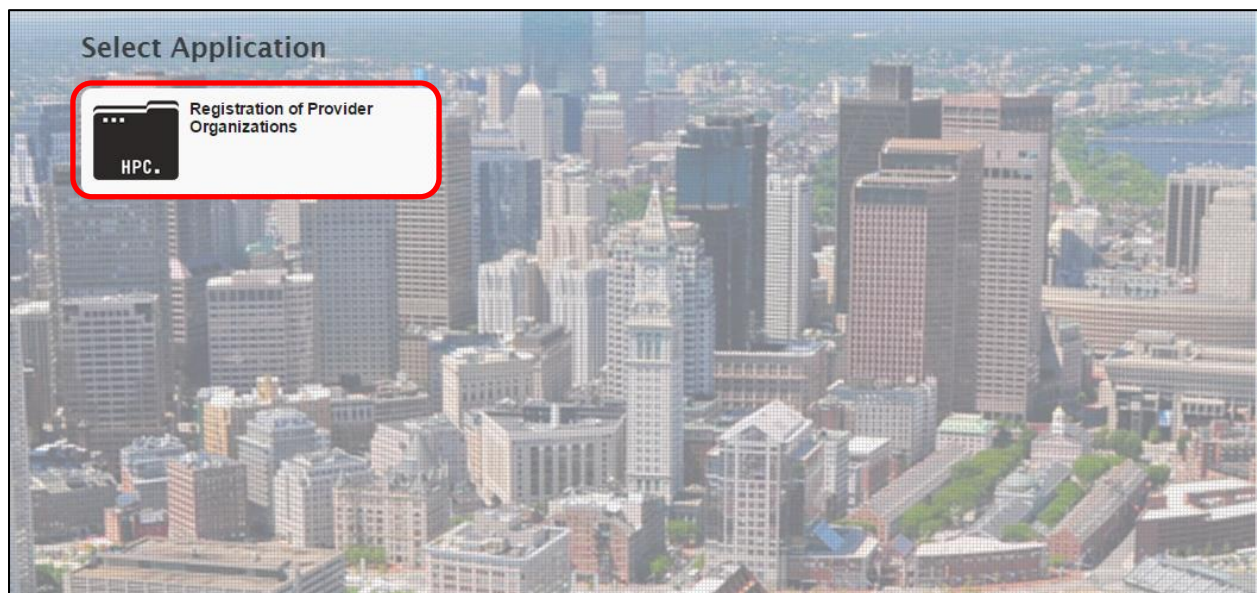
Home Page Tab

After opening the RPO application, you will be directed to the Home Page. From this page you can see program updates and the status of your application. You can also access important program documents, including the Data Submission Manual (DSM) and Microsoft Excel filing templates, in the Resources section.


The status of your application will either be **RPO In Progress**, **Under Review**, or **Approved**. The status of your application will be **RPO In Progress** until you have finalized your materials and submitted them to the HPC for review. Your application will then be considered **Under Review** until the MA-RPO program either requests updates to your materials (returning your application to **RPO In Progress** status) or determines that your materials are complete and updates your application status to **Approved**.

The Home Page will also display either the number of days until your application is due to the MA-RPO program, or, if you have already submitted your materials, the date of your most recent submission.

Status	Date Submitted	Days until Due
RPO In Progress		70 day(s)

Status	Date Submitted	Days until Due
Under Review	10/16/2015	

To view your application materials, click the Application tab on the top of the page. If at any point you want to return to the Home page, click the Home tab.
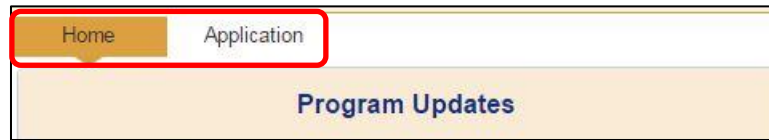
If you submitted an application in 2015, you can view your completed application by clicking the calendar icon in the top right hand corner of your screen and selecting 2015 from the drop-down menu. Your 2015 filing will open in a new tab in your browser.
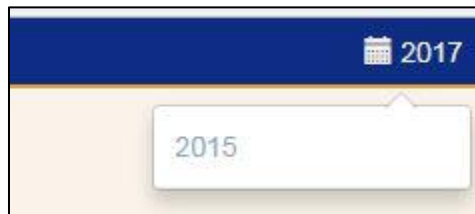
Application Tab and General Instructions

A. Application Tab General Layout

The Application tab has seven subtabs that correspond to files in the DSM: Background Information, Corporate Affiliations, Contracting Affiliations, Contracting Entity, Facilities, Clinical Affiliations, and File Attachments. The online submission platform does not have a subtab for the Physician Roster, the Financial Statements, or the Alternative Payment Method (APM) and Other Revenue file as these files cannot be edited from within the online submission platform and must be submitted as File Attachments. To navigate through the system, click on the subtab that you want to view. If you are reporting on behalf of more than one Provider Organization, you will be able to select the Provider Organization whose application you want to access.

Background	Corporate Affiliations	Contracting Affiliations	Contracting Entity	Facilities	Clinical Affiliations	File Attachments

B. Saving

You can save your progress in the online submission platform at any time. Click "Save" on the top right hand side of the page to save your progress. In order to save a new entity (e.g., a corporate affiliate, a contracting affiliate, etc.) you must enter at least a name and Employer Identification Number (EIN). You can log-out and return to your application as often as necessary.

C. Split-Screen Design

Except for the Background Information file, each of the subtabs has a split-screen design. The left hand side of the page displays a list of the entities (e.g., corporate affiliates, Facilities, clinical affiliates, etc.) while the right hand side displays the detailed information about the selected entity.

The list of entities on the left hand side of the screen can be collapsed using the arrow at the top of the list.

If you have more than 20 entities, you can scroll through the list using the page numbers at the bottom of the list.

To edit the information about a specific entity, select the entity from the list on the left hand side of the page. The entity's detailed information will be displayed on the right hand side of the page.

Detail: Example Health System (HPC In Progress)

| Background | Corporate Affiliations | Contracting Affiliations | Contracting Entity | Facilities | Clinical Affiliations | File Attachments |

Contracting Affiliation Detail   ⊗ Clear all Data   📥 Import Template   💾 Save

Name	EIN
Medical Group 1	88-8888888
Medical Group 2	44-4444444
Medical Group 3	55-5555555

RPO-59 **Legal Name of Contracting Affiliate**
Enter the legal name of the contracting affiliate. *

Medical Group 2

RPO-60 **Contracting Affiliate D/B/A or Alternate Name(s)**
Enter all commonly used names by which the contracting affiliate is known, including any Doing-Business-As names for which the contracting affiliate has filed a D/B/A certificate as required by M.G.L. c. 110, § 5 or the

MG2

D. Importing Microsoft Excel Templates

Because Provider Organizations were entering data into the online submission platform for the first time in Initial Registration, the MA-RPO program issued Microsoft Excel templates to facilitate this process. These templates were used to complete a portion of the data elements in the Corporate Affiliations file and all of the data elements in the Contracting Affiliations file, Facilities file, and the Clinical Affiliations file. Data entered in Initial Registration will be prepopulated in the online submission platform and program staff strongly recommends updating data directly in the online submission platform. **For this reason, the functionality described below is not currently available. Program staff anticipates that it will be phased in over time for some files. If your organization intended to update its Contracting Affiliations file, Facilities file, or the Clinical Affiliations file using Microsoft Excel templates, please contact program staff.**

To import a completed Microsoft Excel template, navigate to the applicable subtab in the Application tab. Click "Import Template" on the right hand side of the page.
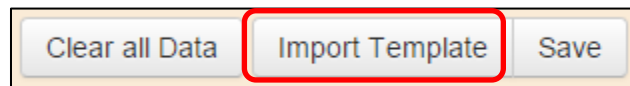
Browse to the file location on your computer and select the completed template. Then select "Import."
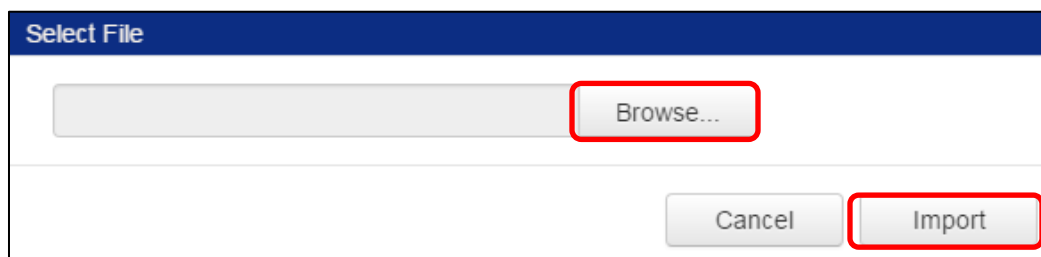
You will see a status bar indicating that your upload has been successful.

When you import the template, all of the existing data will be overwritten by the information in your Microsoft Excel template. If you have an affiliate listed in the online submission platform

that is not listed in your Microsoft Excel template, the system will delete the affiliate. For this reason, program staff recommends that you finalize and import your templates before you make any manual edits in the system. If you need to update information in a Microsoft Excel template, you can import a new template at any time, but the information you import will *overwrite all existing data in the system.* If you get an error message when importing a template, make sure that you have not altered the formatting of the template (e.g., adding or deleting rows) and that you have followed the instructions in the DSM and the templates on how to enter the information properly.

Please note that to add a new entity using the Microsoft Excel template, you should add the entity as a new row in the template. If you delete other affiliates from the file (i.e., if you upload an Excel template that only lists the new affiliate), the online submission platform will delete the other affiliates from the system. Please be aware that if you add, edit or delete an entity manually in the online submission platform, your Microsoft Excel template may be out of date. If you choose to reimport the template, please make sure that any changes that you made manually in the online submission platform also have been made to your Microsoft Excel template; otherwise, reimporting the template will overwrite your manual edits.

If you experience difficulties importing a template, contact program staff for assistance at HPC-RPO@state.ma.us.

E. Adding and Deleting Entities

To add a new entity, click "Add" on the left hand side of the page.
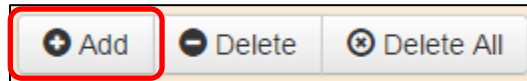
A blank set of questions will appear on the right hand side of the page. Respond to the applicable questions and then click "Save" on the top right hand side of the page. Remember that you must enter both a name and EIN to save a new entity.

To delete an entity, select the entity you want to delete on the left hand side of the screen and click "Delete." To delete all entities, select "Delete All." The system will ask if you are sure you want to delete all of the entities on the subtab. If you select "OK," all of the entities will be deleted and you will not be able to recover these entities.
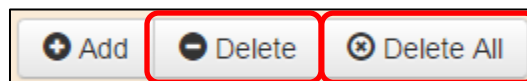
F. Required Questions

A red star next to a data element indicates that the question must be answered.

You may click "Save" at any time as long as you have entered an entity's name and EIN. The online submission platform can help you track your progress in completing the required fields. Once you have completed all of the required fields for an entity, the online submission platform will highlight the entity in green on the left hand side of the page. If you have not answered all of the required questions for an entity, the online submission platform will highlight the entity in red. The online submission platform also highlights tabs that have missing information in red.

As shown below, the online submission platform identifies required questions that are incomplete with red outlines around the question.

RPO-43 **Legal Name of Corporate Affiliate**	
Enter the legal name of the corporate affiliate. *	Medical Group

RPO-44 **Corporate Affiliate D/B/A or Alternate Name(s)**	
Enter all commonly used names by which the corporate affiliate is known, including any Doing-Business-As names for which the corporate affiliate has filed a D/B/A certificate as required by M.G.L. c. 110, § 5 or the applicable laws of another state.	

RPO-45 **Corporate Affiliate Employer Identification Number (EIN)**	
Enter the 9-digit Employer Identification Number (EIN) for the corporate affiliate. *	98-7654321 ☐ N/A

RPO-46 **Corporate Affiliate Zip Code**	
Enter the 5-digit zip code of the primary physical address for the corporate affiliate. *	☐ N/A

RPO-47 **Corporate Affiliate Tax Exempt Status**	
Does the IRS recognize the corporate affiliate as tax-exempt? *	○ Yes ○ No

In addition, when you click "Save" after adding or updating an entity's data, a pop-up message will alert you to any missing information.

Alert Message

⚠ Corporate affiliate saved successfully. The following required data elements have not been completed and are now highlighted in red. You can complete these data elements at a later time.
RPO-46

OK

G. Question Logic

The online submission platform uses question logic to indicate whether or not certain questions have to be completed. For example, if a Provider Organization states that it does not contract for affiliated Providers (Data element RPO-66 in the Contracting Entity file), the Provider Organization will not have to answer data element RPO-67: Services Offered to Contracting Affiliates. If you select "No" in response to RPO-66 to indicate that your Provider Organization does not contract for affiliated Providers, the online submission platform will automatically shade RPO-67 in grey and change the cursor to a red no sign to make clear that you are not required to answer this question.

The question logic will also indicate if you can bypass an entire file. In RPO-42, you can indicate, for example, whether you have any reportable Contracting Affiliations. If you indicate that you do not have any reportable Contracting Affiliations, the system will grey-out the Contracting Affiliations tab at the top of the page. You will not be able to click on this tab or answer any of the questions in this file. If your contracting relationships change and you now have to report Contracting Affiliations, you can access the Contracting Affiliations subtab by unchecking "My organization does not have any reportable Contracting Affiliations" in RPO-42: Applicable Files on the Background Information file subtab.

H. Recommended Order of Completing Files

The MA-RPO program strongly recommends completing updates to the Corporate Affiliations file and Contracting Affiliations file before reviewing or entering information about your other relationships. The online submission platform will use the information from your Corporate Affiliations file and Contracting Affiliations file to populate other questions on other tabs. For instance, responses to RPO-48 are used to prepopulate answer options in RPO-49 and RPO-63. Responses to RPO-49 and RPO-63 are then used to populate RPO-65A. Please remember to click "save" after making updates to any of these data elements so that answer options populate appropriately in subsequent data elements.

I. Exporting Your Application to Excel

To facilitate printing, you can export your application into an Excel spreadsheet by clicking "Download RPO Data" on the home page. Each file will download into a separate tab of the Excel spreadsheet.
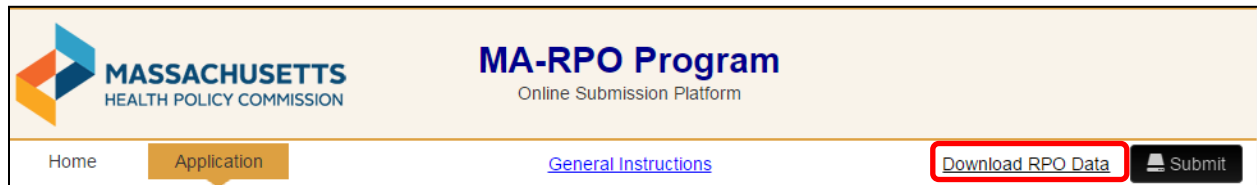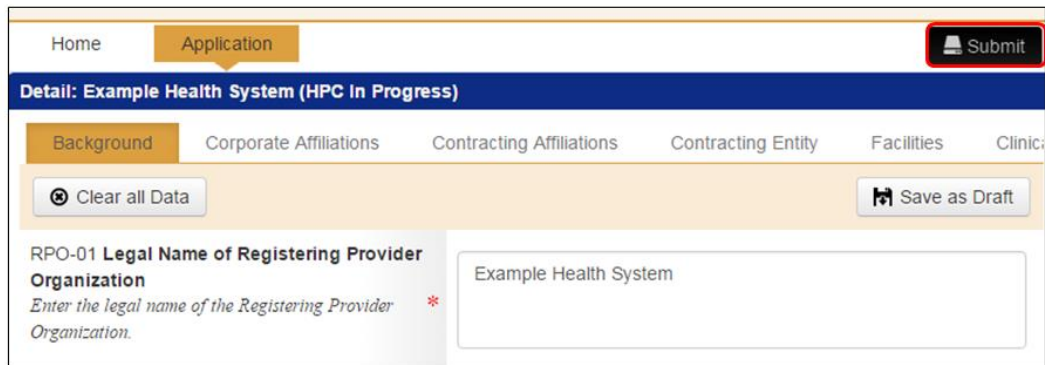
You can also download individual files by clicking on the "Export to Excel" button on each subtab.
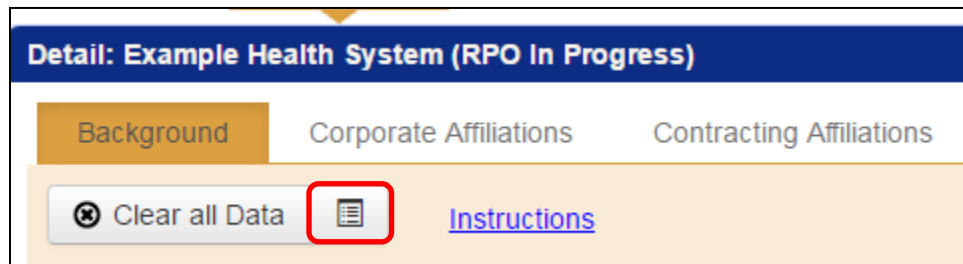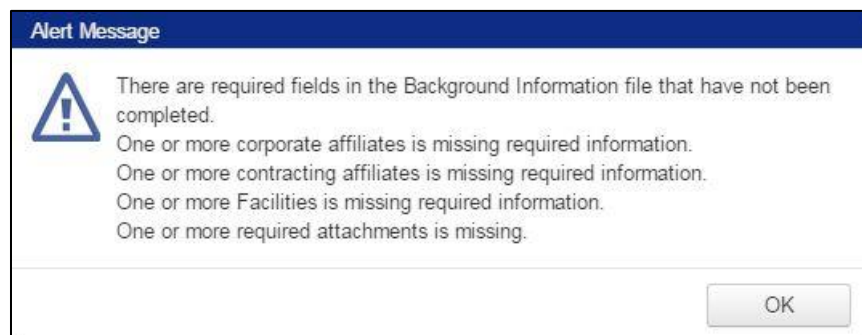
J. Submitting Final Materials

When you have completed all of the required application materials and are ready to submit your materials, select "Submit" on the top right hand side of the page.

If you click "Submit" without answering each of the required questions, you will receive a pop-up alert identifying the tab(s) with missing information. You must complete these fields before submitting your final materials.

Once you click "Submit" you will not be able to edit your files. If you need to edit your files after you have submitted them, please contact program staff at HPC-RPO@state.ma.us.

Application Subtabs and File-Specific Instructions

This section of the User Manual contains specific instructions on how to complete the Contracting Entity file and the File Attachments. These files have unique features that differ from the general instructions.

A. Contracting Entity Subtab

The MA-RPO program has revised data element RPO-65 and added a new data element RPO-65A for the 2017 filing. In RPO-65, you will select each type of contract your Corporately Affiliated Contracting Entity(ies) *establishes* with each listed Payer or Payer category. To do this in the online submission platform, you will click "Edit" after you have selected a Contracting Entity.

A new window will appear for you to answer RPO-65 for that Contracting Entity. Clicking "Save" will save your answers and leave the RPO-65 window open on your screen. "Save and Close" will save your answers, close the window, and return you to the Contracting Entity tab. Clicking "Cancel" will not save your answers and allow you to return to the Contracting Entity tab.

 In RPO-65A, you will select each type of contract in which each corporate and/or contracting affiliate participates that was established by the Contracting Entity named in RPO-65. A list of your corporate and/or contracting affiliates for which you are required to complete RPO-65A has

been prepopulated based on your responses to RPO-49 and RPO-63. You can select the corporate affiliate or contracting affiliate from this list and click "Edit." A new window will appear for you to respond to RPO-65A for that affiliate. Alternately, you can click "Edit" first and select among your list of corporate and/or contracting affiliates once the RPO-65A window opens.

You can use the orange button (shown below) to collapse or expand the list of affiliates, as necessary.

Clicking "Save" will save your answers and leave the RPO-65A window open on your screen. "Save and Close" will save your answers, close the window, and return you to the Contracting Entity tab. Clicking "Cancel" will not save your answers and allow you to return to the Contracting Entity tab.
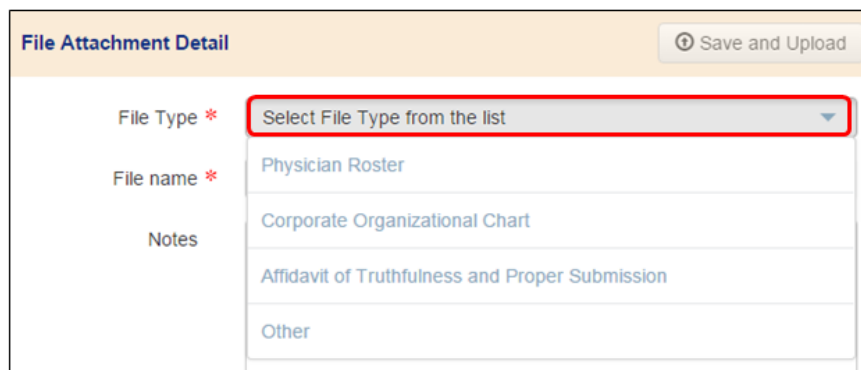
B. File Attachments

You will use the File Attachments subtab to upload your corporate organizational chart, Affidavit of Truthfulness and Proper Submission, Physician Roster(s), Financial Statements file(s) and audited financial statements, and APM and Other Revenue file(s) as applicable. The data in these files is not editable from within the online submission platform. If you need to edit the information contained in one of these files, you must make the edit within the Microsoft Excel template and upload a revised version to the online submission platform. Each Microsoft Excel template should be renamed with the name of the corporate affiliate or Corporately Affiliated Contracting Entity for which the file is being submitted.

You must upload a new physician roster, if applicable, and a new Affidavit of Truthfulness and Proper Submission. You cannot use the same physician roster or affidavit that was submitted in Initial Registration. You may use the same corporate organizational chart that you submitted in Initial Registration if it is still accurate.

If you would like to add any notes or explanatory information to your submission, you may upload those separate documents here and select file type "Other." **Please note that any information so submitted will be a public record and will be part of your MA-RPO registration.**

To add a file, select the file type from the drop-down menu on the right-hand side.

Next, click "Browse."

If you would like to add a brief note to your file, type the text into the Notes field. Then click "Save and Upload."

You will see a status bar indicating that your upload has been successful.

To add another file, click "Add" in the upper left hand corner.

To delete a file, click on the file you would like to delete on the left hand side of the page and press "Delete."

Any file attachments (e.g., corporate organizational chart, explanatory notes, etc.) that you submitted in Initial Registration will be available in the 2015 platform. If you would like to include any previously submitted attachments as part of your 2017 filing, you may download the attachment from the 2015 site by clicking on the File Name link. You may then save the file and follow the instructions above to add it to your 2017 application. As noted above, you cannot use the same physician roster or affidavit that was submitted in Initial Registration.

Contact Information

If you have any questions about the online submission platform, please e-mail us at HPC-RPO@state.ma.us.